Flow LTA Beaker AP Guide:

Creating a Case for OHSU Specimens:

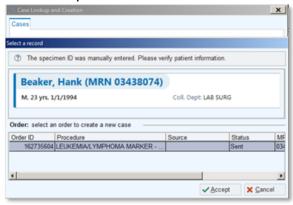
See the Flow LTA OHSU Bone Marrow Beaker Guide for information on how to perform an OHSU Bone Marrow collection in Beaker.

Blood, CSF, Body Fluid Specimens or Hemepath Smear Review:

1. Go into **Case Builder** to begin a case. You can enter it from the link on your Beaker AP Lab Dashboard or through the ••• **Actions** icon-> Case Builder.



- 2. Once the "Case Creation and Look-up" window is open:
 - a. If the specimen has an AP Beaker specimen label (Ex. 162735604-A) then scan the label using the barcode reader. Click the **Accept** button.
 - b. If this specimen does not have an AP Beaker specimen label, then you can enter the patient's name or medical record number in the look-up field. Verify the patient information is correct and select your test from the tests that are listed. Click the **Accept** button.



- 3. The **Case Builder** window will open. If the specimen does not have a case ID assigned, then it will start a new case. If one exists, then it will open the current case for this specimen.
- 4. At least 1 specimen should already be listed in Case Builder. If the **Source** field is empty (yellow yield sign icon), enter any source information you have manually.
- 5. Click the **Accept and Stay** button. If this is a new case, then this will create a case number that starts with "**HM**-"



As part of the check-in process, all blood, CSF, and body fluids cases will need a cell count and differential pulled into the case results. See the section "Adding Cell Counts(CBC) and Differentials into a HM- case" later in this guide for information.

6. Skip to the Adding Specimens in Case Builder section of this guide to continue working in **Example 2** Case Builder.

Tissue Specimens:

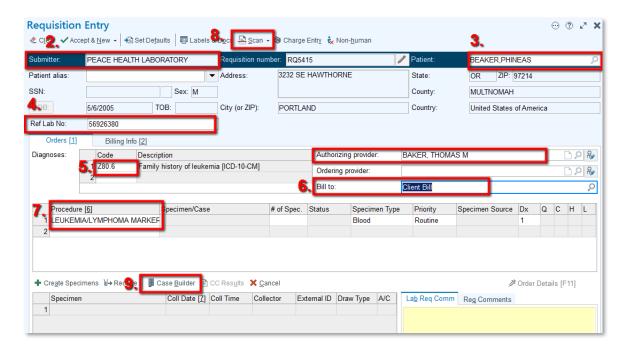
Tissue samples will be handled differently, depending on which department it comes from at OHSU. In all cases, tissues samples that are collected within OHSU must be processed and assigned a Surgical Pathology, Cytology or Casey Eye Institute case number before they are accessioned and processed in the Flow lab.

- 1. If the sample is from Surg. Path or if it's a Cytology FNA: You can use the current case number that starts with SP or CY and just add Flow tasks in Case Builder. Use the Case Builder link on your Beaker AP Lab Dashboard or through the Actions icon-> Case Builder. Skip to the Adding Specimens in Case Builder section of this guide to continue working in Case Builder.
- 2. If the sample is a non-FNA cytology sample, or if the sample is from Casey Eye Institute, then you need to create a case number that starts with HM and link the original order to the new case. See the guide: Flow LTA-Receiving CEI or Non Gyn Cyto Cases Guide

Creating a Case for a Non-OHSU Submitter:

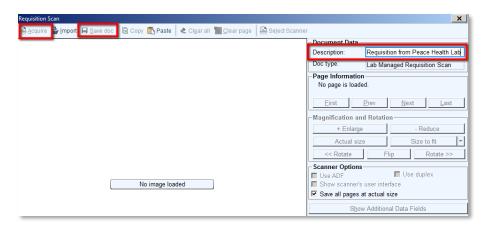
Tissue: If the specimen is fresh and ONLY has Flow tests ordered, follow the **Requisition Entry** steps below. All other tissues from an outside submitter should be given to Surg Path to create the SP case.

1. Use Chart Search to open **Requisition Entry** or find the link to **Requisition Entry** from your starting Dashboard.



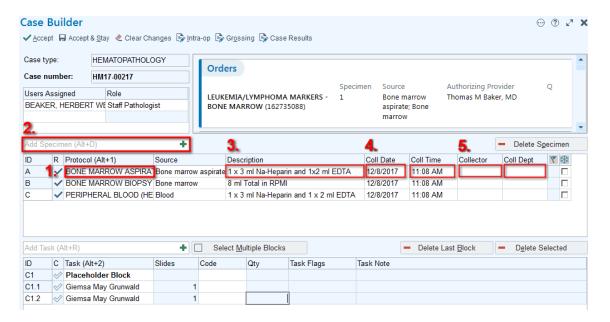
- 2. Enter the submitter information in the **Submitter:** field. If this is a industrial account, search for the company name. If this is not an industrial account, contact Client Services or your supervisor as to what should be entered in this field.
- 3. In the **Patient** field: Search for the patient name, with the format "Lastname, Firstname." Make sure to search for a pre-existing patient using multiple identifiers. If the patient does not exist in the database, the patient will need to be created.
- 4. Enter the outside submitter's case number in the **Ref. Lab No.** field. If the outside submitter's case number includes letters, do not include the specimen letters in this field.
- 5. Enter the diagnosis code in the **Code** field and authorizing provider in the **Authorizing provider** field
- 6. In the **Bill to:** field: Some industrial accounts will default either Client or Patient billing. If this field is blank, then determine from the paperwork or from other sources whether this is a Client Bill or Patient Bill.
- 7. In the **Procedure** field, enter the test being performed. Type part of the name of the test and press Enter to open the Order Search window. When you choose a procedure, the specimen type and priority appear. In the **# of Spec.** field: Leave this field blank
- 8. To scan in the paper requisition/orders into Beaker, you can press the **Scan** button.

a. Type in a description in the **Description** field.



- b. Load the paper into the scanner, and click the **Acquire** button.
- c. Once the paper has been scanned, click on the **Save Doc** button.
- 9. When the requisition entry screen has been filled out, click **Case Builder** button to begin processing the case. This will bring up a new window.

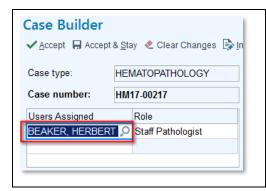
Adding Specimens in Case Builder:



- 1. Once you are in **Case Builder**, you need to add a specimen if one is not listed. For most samples types, 'Protocol' field will be populated automatically. If it is missing, then click on the **Protocol** field for Row A and type part of the name and it will suggest specimens that match.
 - a. If you are checking in a CSF or Body Fluid, then you will need to choose a protocol. Also designate a source in the "**Source**" field.
- 2. If you need to add additional specimens, then use the **Add Specimen** field to add more specimen rows. Each additional specimens will get assigned a subsequent letter.
- 3. Add details about the specimen in the **Description** field. Examples:
 - a. For a peripheral blood or bone marrow aspirate for flow:
 - i. 1 x 3 ml Na-Heparin, or
 - ii. 1 x 3 ml Na-Heparin and 1 x 2 ml EDTA
 - b. For a peripheral blood, bone marrow, or body fluid for flow received in RPMI:
 - i. 8 ml Total in RPMI, or
 - ii. 10 ml Total in RPMI
 - c. For a tissue received on RPMI:
 - i. 1 x 1 x 1 centimeters cubed in RPMI, or
 - ii. Small Shreds of Tissue in RPMI, or
 - iii. No Visible Tissue in RPMI
 - d. For a hemepath smear review:
 - i. 2 Stained Smears, or
 - ii. 1 x 3 ml EDTA and 1 Stained Smear
- 4. Make sure the Collection Date field and Collection Time field is filled in. If you want to use today's date for Collection Date, type "t" in the Collection Date field. If you want to use the current time, type "n" in the Collection Time field.
- 5. Enter the appropriate information in the **Collector** and **Coll Dept** field.
- 6. Click **Accept and Stay** to save and continue in **Case Builder**.

Assigning the case to a Pathologist/Resident:

While you are in **Case Builder**, you need to assign the staff pathologist assigned to the case. In the **User Assigned** field, fill in the name of the attending pathologist that is on service. Note: You can also assign roles in **Case Results** by using the **Assign** button.

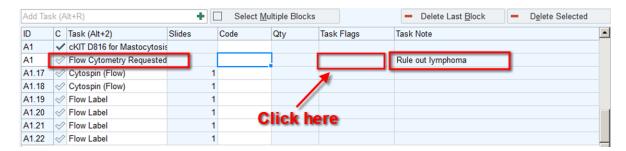


- For a heme path smear review or outside bone marrow you would pick the attending pathologist that is on the 'Bone Marrow Service'.
- For all other sample types, you would pick the attending pathologist that's on the 'Outside and Flow Service'. See the monthly schedule that is sent out via Outlook for specific monthly assignments.

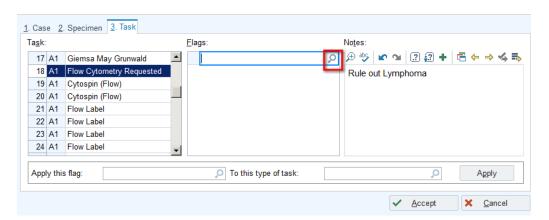
Adding a Task Flag on a task:

Most of the time, when a specimen protocol is added, the appropriate tasks are also filled in. If the pathologist orders "Flow Cytometry Needed" then the LTA/Flow Tech will need put a Task flag on the "Flow Cytometry Needed" task so that the Techs will be able to see in Case Prep Worklist that the sample has been received in the Flow lab.

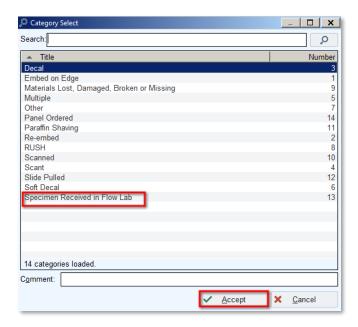
1. In Case Builder, find the "Flow Cytometry Request" task in the list. Note the task note. Click in the Task Flag Field for the "Flow Cytometry Needed" row.



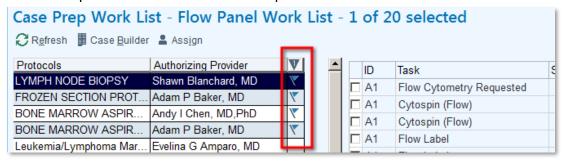
2. Click on the Magnifying glass icon in the middle under the Flags: section.



3. Choose "Specimen Received in Flow Lab", and press the Accept button.



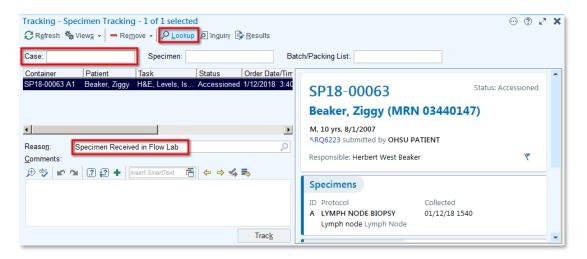
4. Now when the Flow techs look at their **Case Prep Work List**, they will see an icon that shows a flag. This will help the techs determine which specimens have been received.



Adding Tracking to track when specimens arrive in the lab:

When a Surg Path or Cyto specimen is received in the Flow Lab, you need add a Tracking event to document the receipt (date/time) of the specimen from Surg Path/Cyto.

- 1. To track which cassettes are embedded, open the **I Tracking** activity by clicking on the **Tracking** link on your **Beaker AP Lab Dashboard.** Make sure you are viewing the **Specimen Tracking** view. To change your view in the Tracking activity, click on **Views** and pick the view you want.
- 2. Scan the specimen blocks/slides that you received. If you need to manually enter the blocks/slides, then click on the Lookup button and type the block/slide manually. Ex. SP18-00063 A1 for a block or SP18-00063 A1-1 for a slide.
- 3. If you scanned multiple blocks and slides, select all the rows by using CTRL or SHIFT. Change the Reason field to "Specimen Received in Flow Lab". Click on the Track button.

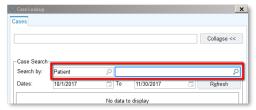


4. The case will disappear from the list, and the case will have a tracking note that shows a Tracking comment of "Specimen Received in Flow Lab".



Adding the CBC and Diff results into Case Results:

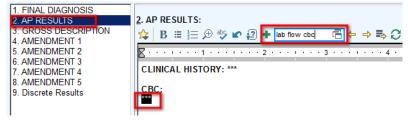
- 1. To get to Case Results:
 - a. If you are still in **Case Builder**, then you can press the **Case Results** button.
 - b. Scan the specimen's barcode while you are viewing the **Outstanding List**.
 - c. If you have the Case ID# and do not have a barcode, you can click on the **Case Results** link on your dashboard and type Case ID# in first field.
 - i. Alternately, you can search by Patient name in this window by clicking the **Expand** button. Search for the patient's name (Format: Lastname, Firstname).



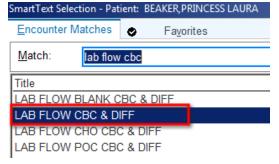
2. When **Case Results** opens, click on the **Results** button in the middle of the screen.



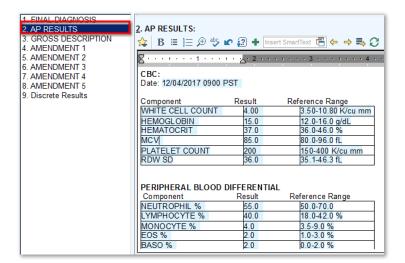
- 3. On the right side of the screen, you will see linked orders. If there is a green checkmark next to the CBC & Diff, it is resulted and you can pull it in.
- 4. On the left side of the screen, make sure **2. AP Results** is selected. In the text window to the right, scroll all the way up to the top.
 - a. Click on "CBC:" under Clinical History in the text field and press F2 on your keyboard to select the ***'s. .



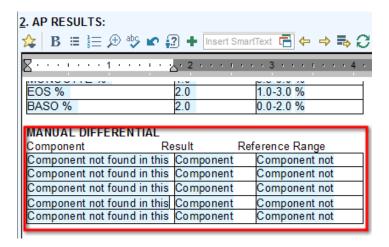
5. To insert the CBC and Diff data, you need to pull in the correct SmartText. Click in the **Insert** SmartText field and choose OHSU's "LAB FLOW CBC & DIFF" (not CHO or POC). Click **Accept** button.



6. The CBC information will be displayed in a table.



7. Scroll down a bit to see below the Peripheral Blood Differential table. Highlight and delete the manual diff table if there is no information listed.



8. Click the **Save** button and exit **Case Results**.

Alternatively, if you don't want to use the SmartText table (Or your CBC results are from CHO or POC), you can copy and paste the information using the link to the CBC/Diff in Case Results. Click on CBC and Auto Diff: Linked Orders ∧ Order Type 月 CBC AND AUTO DIFF Related To copy: Use your mouse to select the CBC and Diff information from the Lab Order Result

- window that pops up and press CTRL-C on your keyboard to copy. Close this window.
- To paste: Click on the Results button and go back to the 2. AP Results Component. Click your cursor where you want to paste the table. Press CTRL-V to paste the information.

Processing CSF Specimens:

CSF specimens from a non-OHSU submitter are processed by the Flow techs who will create a cytospin for the specimen and follow the usual Specimen/Triage steps. (See the Flow Tech Quick Start Guide for more information.)

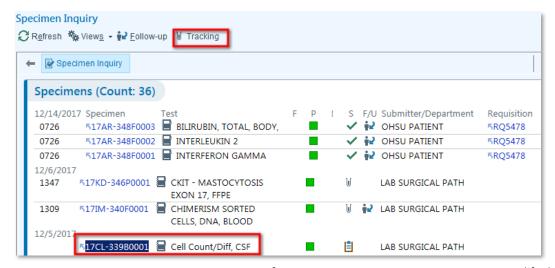
If the CSF specimen is from an OHSU department, then the LTA's will perform the following steps.

Summary:

- 1. LTA's will pick up the cytospin slide from Hatfield lab AFTER Hatfield has completed their CSF Cell Count and Differential.
- 2. The LTA will add a tracking note in CP Beaker.
- 3. Pull in the Cell Count/Diff into the AP case.
- 4. Print the slide label and confirm that the CSF triage slide has been prepared off the Case Prep Work List.
- 5. Add Task Flag of "Specimen Received in Flow Lab." See instructions about "
- 6. Add Tracking event of "Specimen Received in Flow Lab."
- 7. Print out a 7-cut label.
- 8. Put a cover slip on the slide and put the slide and 7-cut label in the box called "Cases for Triage" on the Flow bench.

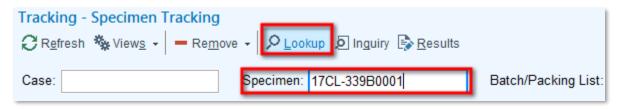
Detailed instructions are as follows:

- 1. After the CSF specimen has been accessioned through Case Builder, the LTA will coordinate with Hatfield Lab to retrieve the cytospin slide.
- 2. A CP specimen tracking note needs to be entered to track that the slide was picked up from Hatfield Lab. To accomplish this:
 - a. Click on the Specimen Inquiry by Patient link on the Beaker AP Lab Dashboard tab.
 - b. Enter the patient's name and date of birth or the MRN number and click the **Accept** button.
 - c. Find the Cell Count/Diff, CSF that corresponds to the slide you retrieved at Hatfield Lab. Copy the Specimen ID (select the ID and press CTRL-C)or write down the specimen ID). Click the **Tracking** button.

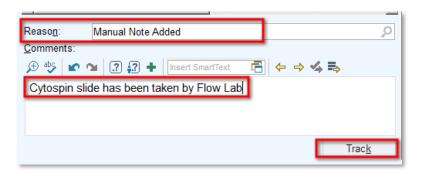


Page 11 of 19

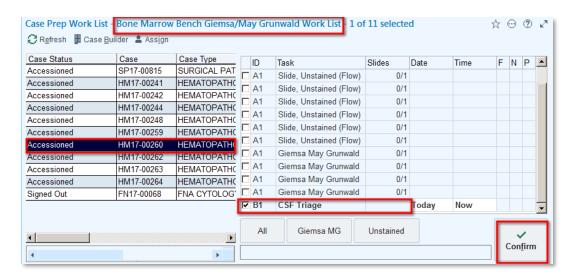
d. In the Tracking window, click the **Lookup** Button and paste(CTRL-V) or manually type the specimen ID in the **Specimen** field.



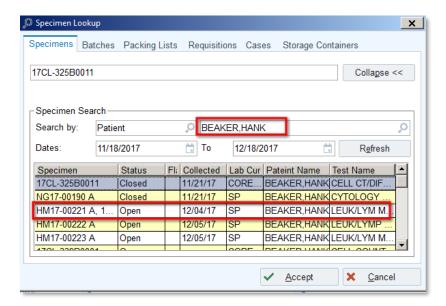
e. In the **Reason** field, click on the magnifying glass and choose the reason "Manual Note Added". Enter in the **Comments** field that the slide has been taken by the Flow Lab and click the "**Track**" button.



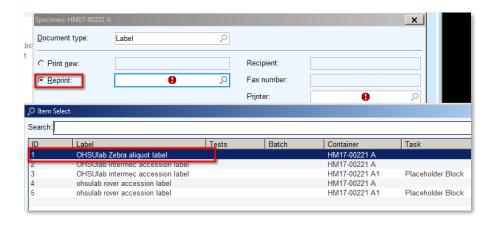
- 3. The LTA will put in the Cell Count(CBC)/Differential into the case. See the section "Adding in the CBC and Differential into Case Results" earlier in this guide for more information.
- 4. To print the slide label and confirm that the CSF triage slide has been prepared, the LTA needs to confirm the CSF Triage step in the Case Prep Work List.
 - a. Click on the tab to open up Case Prep Work List. You can also find a link to it from your Beaker AP Lab Dashboard.
 - b. Make sure you are viewing the **Bone Marrow Bench Giemsa/May Grunwald Work List** view. To change your view, click on the Actions button and choose Views and pick the view you want.



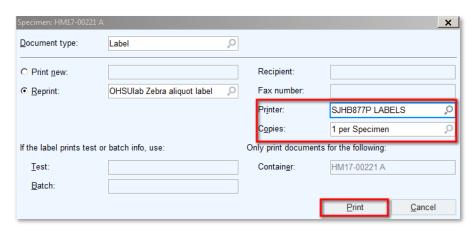
- c. Find the case you are working on, and check off the **CSF Triage** option on the right side. Click on the **Confirm** button.
- 5. Add Task Flag of "Specimen Received in Flow Lab." See the section earlier in this document about "Adding a Task Flag on a task:"
- 6. Add Tracking event of "Specimen Received in Flow Lab." See the section earlier in this document about "Adding Tracking to track when specimens arrive in the lab:"
- 7. Next, the LTA will need to print an AP Beaker 7-cut zebra label to accompany the slide for triage. To print a 7-cut label:
 - a. Click on the **Label Print** link on the AP Dashboard. On the **Specimens** tab, click the **Expand** button and perform a patient search for the patient.
 - Find the row that corresponds to the HM case that you are working on (NOT the Cell Ct/Diff). Click the **Accept** button.



c. Select the **Reprint** field and click on the magnifying glass icon. Choose the "OHSUlab Zebra aliquot label".



d. Choose the appropriate printer for your workstation. Click the **Print** button.

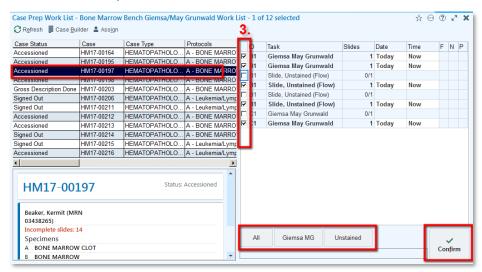


8. Write the word "triage" on the 7 cut label, and attach to the slide. Put a cover slip on the slide. Put the slide and label in the "Cases for Triage" box on the Flow bench.

Printing Slides from Case Prep Work List:

The **Case Prep Work List** is where you will see all the cases that have unstained slides and other stain tasks that have been ordered.

- 1. Open up click on the tab to open up **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard.
- 2. Make sure you are viewing the **Bone Marrow Bench Giemsa/May Grunwald Work List** view. To change your view, click on the •• **Actions** button and choose **Views** and pick the view you want.
- 3. Select the case you want to confirm on the left. On the right side, **check off** the Unstained slides and the Giemsa May Grunwald tasks you want to confirm. The **Date** and **Time** will default to the current date and time, but you can edit those fields if needed.
- 4. To check off multiple tasks, you can use the buttons on the bottom to select categories such as **All** Tasks, **Giemsa/MG**, and **Unstained**.
- 5. When you have selected the appropriate tasks, then click the **Confirm** button in the right bottom corner. This will print the slide labels for the confirmed tasks.



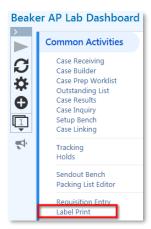
Example of the Slide Labels:



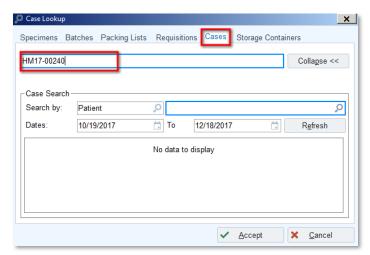
Reprinting Slide Labels:

If you need more slide labels or need to reprint existing labels, you can use the **Labels and Docs** activity to print additional slide labels.

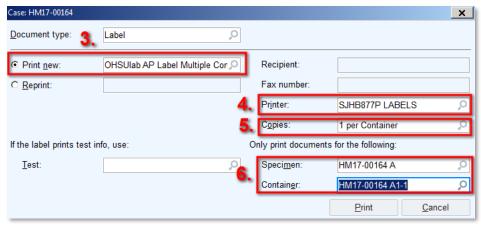
1. Click on the Label Print link on your Beaker AP Lab Dashboard.



2. Click on the Cases tab. Type in the case number manually. Click the Accept button.



3. Choose **Print New** and click on the magnifying glass to select "OHSUlab AP Label Multiple Containers per row". (If Print New is grayed out, then choose Reprint with the same setting.)



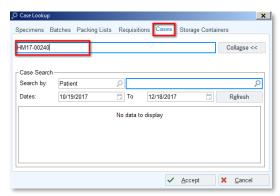
4. Choose the appropriate printer for your workstation from the list.

- 5. In the Copies field, choose "1 per Container"
- 6. Choose the **Specimen** (if there are multiple specimens). In the **Container** field, choose the container you want to print.
- 7. Click on the **Print** button.

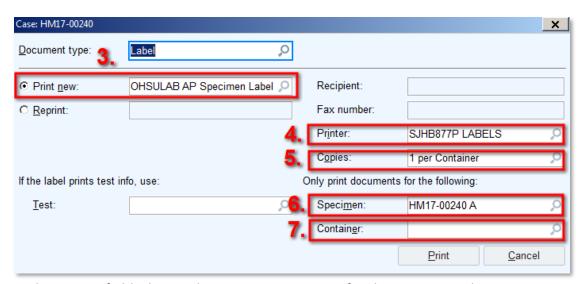
Printing AP Specimen Labels:

If you need AP Specimen Labels (rectangular labels) or need to reprint existing labels, you can use the **Labels and Docs** activity to print additional specimen labels.

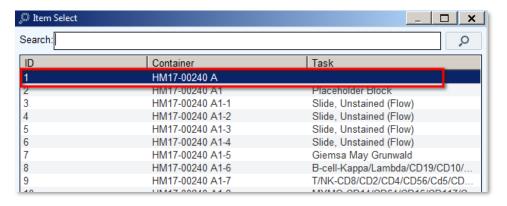
- 1. Click on the **Label Print** link on your Beaker AP Lab Dashboard. If you added the **Labels and Docs** button to your main toolbar, you can also use that button.
- 2. Click on the **Cases** tab. Type in the case number manually. Click the **Accept** button.



3. Choose **Print New** and click on the magnifying glass to select "**OHSULAB AP Specimen Label**". (If Print New is grayed out, then choose Reprint with the same setting.)



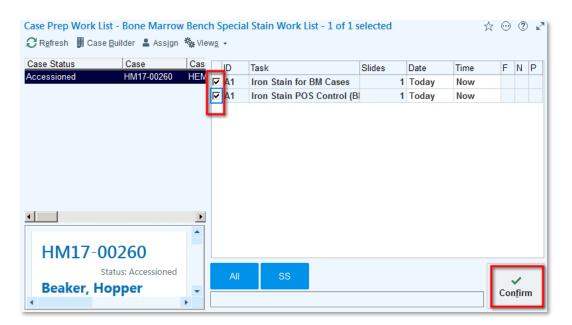
- 4. In the **Printer** field, choose the appropriate printer for the current workstation.
- 5. For the **Copies** field, make sure the "1 per Container" is selected.
- 6. In the **Specimen** field, choose the appropriate specimen if there are multiple specimens listed.
- 7. In the **Container** field, choose the first choice that has just the trailing specimen letter and no numbers after it. Ex. HM17-00240 A. Click the **Accept** button.



8. Click the **Print** button.

Special Stains(BE, MPO and Iron) in Case Prep WorkList:

- 1. Open up click on the tab to open up Case Prep Work List. You can also find a link to it from your Beaker AP Lab Dashboard.
- 2. Make sure you are viewing the **Bone Marrow Bench Special Stain Work List** view. To change your view, click on the •• **Actions** button and choose **Views** and pick the view you want.
- 3. Select the case you want to confirm on the left. On the right side, **check off** the special stains tasks that you want to confirm. The **Date** and **Time** will default to the current date and time, but you can edit those fields if needed.
- 4. To check off multiple tasks, you can use the buttons on the bottom to select categories such as **All** Tasks, or **SS**.
- 5. When you have selected the appropriate tasks, then click the **Confirm** button in the right bottom corner. This will print the slide labels for the confirmed tasks.



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